

MASSACHUSETTS STATE ETHICS COMMISSION
ONE ASHBURTON PLACE – RM 619
BOSTON MA 02108-1501
(617) 371-9500

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STATE ETHICS COMMISSION

08 MAY 27 PH 4:31

STATEMENT OF FINANCIAL INTERESTS FOR CALENDAR YEAR 2007

Please provide the requested information. As required by G.L. c. 268B, the Financial Disclosure Law, you must answer all questions to the best of your knowledge. If your answer to any question is "none" or if any question is not applicable to you, check "Not Applicable". If extra space is needed to complete a response, attach additional pages, clearly noting to which question the information relates.

1: Reporting Data

Person Reporting:	Deval L. Patrick
Address:	[REDACTED]
City:	[REDACTED]
State:	[REDACTED]
Zip:	[REDACTED]
Office Phone:	617 725 4000
Fax Number:	
Email:	
Name of spouse residing in your household:	[REDACTED]
Names of dependent children residing in your household:	[REDACTED]

SEE AMENDMENT

2: Candidate: I am a candidate for the following office:

Not Applicable

3: Positions Held

Agency in which you served:	Executive
Your Position:	Governor
Start Date:	January 4, 2007
End Date if Applicable:	
Amount of Income Earned in 2007:	\$100,000 or more (actual 2007 - \$133,990)

4: Other Government Position(s)

Not Applicable

5: Employment and Other Associations with Businesses and Non-Governmental Entities
(Including Non-Profit Organizations)

Name of Business:	Texaco Group LLC
Address:	P.O. Box 6041 San Ramon, CA 94583
Position Held:	Former Senior Executive (Resigned in 2001)
Filer or Immediate Family member:	Filer
Gross Income (Filer Only):	\$1,001 to 5,000 (actual 2007 - \$2,700)

Name of Business:	Ropes & Gray
Address:	One International Place Boston, MA 02110
Position Held:	Partner
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	United Way of Massachusetts Bay
Address:	51 Sleeper Street Boston, MA 02210
Position Held:	Director
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	Jane Doe, Inc.
Address:	14 Beacon Street – Suite 507 Boston, MA 02108
Position Held:	Board Member
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Deval L. Patrick
Statement of Financial Interests

Name of Business:	The Posse Foundation, Inc.
Address:	14 Wall Street – Suite 8A-60 New York, NY
Position Held:	Board of Directors
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	Epiphany School
Address:	154 Centre Street Dorchester, MA 02124
Position Held:	Board of Overseers
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	Partners Healthcare
Address:	101 Merrimac Street Boston, MA 02114
Position Held:	Incorporator
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

6. Business Ownership/Equity

Not Applicable

7: Transfer of Ownership/Equity Interests

Not Applicable

8: Leaves of Absence

Not Applicable

9: Gifts

Not Applicable

10: Honoraria:

Not Applicable

11: Reimbursements:

Not Applicable

12. Commonwealth of Massachusetts: State or Local Government Securities

Not Applicable

13: Securities and Investments

(See list attached at end of Statement of Financial Interests.)

14: Creation of Business and Charitable Trusts

Not Applicable

15: Business and Charitable Trust Holdings

Not Applicable

16: Family Trusts

Securities and other investments are held in a "blind trust."

17: Creation of Realty Trusts

Not Applicable

18: Realty Trust: Real Property Holdings

Not Applicable

19: Realty Trust: Mortgage Obligations

Not Applicable

Deval L. Patrick
Statement of Financial Interests

20: Trusts: Purchases/Transfers of Property (In Massachusetts Only)

Not Applicable

21: Trusts: Sales/Transfers of Property (In Massachusetts Only)

Not Applicable

22: Real Property Owned

Address:	[REDACTED]
Description of Property:	Principal residence
Persons Holding Interests	
Record Owners:	Deval L. Patrick and [REDACTED]
Assessed Value:	\$100,000 +

(See also properties listed in Question 23.)

23: Investment and Rental Properties

Address:	[REDACTED]
Description of Property:	Personal residence
Persons Holding Interests	
Record Owners:	Deval L. Patrick and [REDACTED]
Assessed Value:	\$100,000 +

24: Real Property Acquisitions in Massachusetts during 2007

Not Applicable

25: Real Property Sales in Massachusetts during 2007

Address:	2871 State Road Richmond, MA
Description of Property:	House on 14 acres sold July 3, 2007
Persons Holding Interests	
Record Owners:	Deval L. Patrick and [REDACTED]
Assessed Value:	\$100,000 +

26: Mortgage Loan Information

Primary Residence - Address of Property:	
Creditor Name:	SunTrust Banks
Creditor Address:	303 Peachtree Street NE Atlanta, GA 30308
Terms of Repayment Interest Rate:	30-year, ARM note at 4.875%
Year Mortgage Due or Terminated:	2033

Primary Residence - Address of Property:	
Creditor Name:	Bank of America
Creditor Address:	100 Federal Street Boston, MA 02110
Terms of Repayment Interest Rate:	Home Equity Line of Credit, variable rate
Year Mortgage Due or Terminated:	Revolving Line of Credit

Address of Property:	
Creditor Name:	Berkshire Bank
Creditor Address:	24 North Street Pittsfield, MA 01202
Original Amount Borrowed (Filer Only):	\$100,000 +
Amount Owed:	\$100,000 +
Terms of Repayment Interest Rate:	30-year, ARM note at 5.75%
Year Mortgage Due or Terminated:	2037

27: Mortgage Receivable Information

Not Applicable

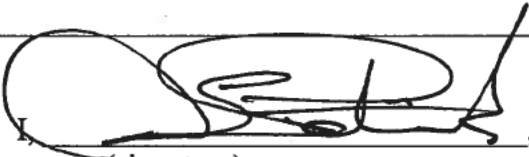
28: Other Creditor Information (each debt, loan, or other liability owed by you and/or any immediate family member)

Not Applicable

29: Debts Forgiven

Not Applicable

30: Certification

I , certify that:
(signature)

- I made a reasonably diligent effort to obtain reportable information concerning myself and IMMEDIATE FAMILY MEMBERS; and
- The information contained on this form is true and complete, to the best of my knowledge.

Submitted under the pains and penalties of perjury 27 May 2008
(date)

The following Immediate Family Members declined to disclose information which is necessary to complete this Statement fully and accurately:

(Not Applicable)

The following is/are the specific Question(s) for which answers were declined by each Immediate Family Member:

(Not Applicable)

Attachment to Statement of Financial Interests Question 13: Securities & Investments

	<u>Issuer</u>	<u>Description</u>	<u>Owner</u>
1	DELAWARE DIVIDEND INCOME	Mutual Fund	Family Member
2	CALAMOS GROWTH & INCOME FUND	Mutual Fund	Family Member
3	LEGG MASON PTNRS AGGRESSIVE GROWTH FD	Mutual Fund	Family Member
4	LEGG MASON PTNRS FUNDAMENTAL VALUE FD	Mutual Fund	Family Member
5	LEGG MASON PTNRS LARGE CAP GROWTH FD	Mutual Fund	Family Member
6	LEGG MASON PTNRS INT'L ALL-CAP OPPORTUNITY	Mutual Fund	Family Member
7	SELIGMAN COMMUNICATIONS & INFORMATION FD	Mutual Fund	Family Member

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AMENDMENT TO STATEMENT OF FINANCIAL INTERESTS
FOR CALENDAR YEAR 2007

08 JUN 12 PM 3:55

Please provide the requested information. As required by G.L. c. 268B, the Financial Disclosure Law, you must answer all questions to the best of your knowledge. If your answer to any question is "none" or if any question is not applicable to you, check "Not Applicable".

25: Real Property Sales

Identify any real properties in Massachusetts which were sold or otherwise transferred from you and/or an IMMEDIATE FAMILY MEMBER at any time during 2007. Property sales held in a REALTY TRUST should be reported in Question 21.

☐ Not Applicable

Address:	2871 State Rd. Richmond, MA
Description of Property:	House on 14 acres – sold July 3, 2007
Name and Address of Purchaser or Transferee:	Garrett Moran & Mary J. Penniman 355 Lake Ave. Greenwich, CT

Certification

I



Deval L. Patrick

certify that:

- I made a reasonably diligent effort to obtain reportable information concerning myself and IMMEDIATE FAMILY MEMBER(S); and
- The information contained on this form is true and complete, to the best of my knowledge.

Submitted under the pains and penalties of perjury

12 June 2008
(date)

The following Immediate Family Members declined to disclose information which is necessary to complete this Statement fully and accurately:

The following are the specific Question(s) for which answers were declined by each Immediate Family Member: